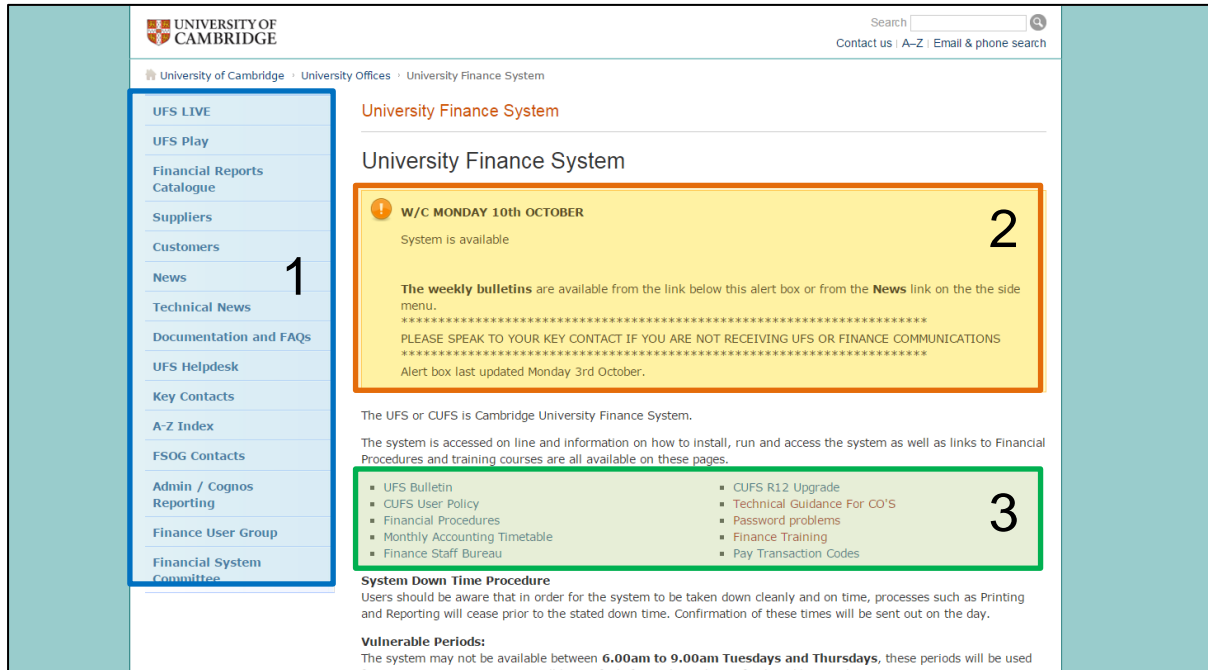




Getting started with UFS

The UFS Homepage



After navigating to <http://ufs.admin.cam.ac.uk>, the page above will display.

Area 1 contains links through to the both the Live and Play systems. You can also access information on the following:

- The Supplier Search and Request system
- Reference and training material
- Helpdesk contacts
- Key contacts

Area 2 contains the UFS notice board. The notice board will communicate important information regarding the system, such as any planned “down time” or any current technical problems.

Area 3 contains links through to:

- UFS bulletin archive
- Financial Procedures
- Finance Staff Bureau
- Month-end timetable
- Technical installation
- Finance Training homepage
- Password problems



Logging into UFS

After selecting either the UFS Live link from the UFS homepage, the following screen will display:

UNIVERSITY OF CAMBRIDGE

*User Name

*Password Please use your CRSID

Accessibility

Select a Language:
[English](#)

[Privacy Statement](#)

To log in to UFS you will need to enter your user name and password, which will have been provided via your key contact for UFS. If you do not yet have a password for the Live system, speak with your key contact to arrange access.

Please note that Finance Training can only provide you with a password for the Play system.

After logging in for the first time, the system will prompt you to change your password for security reasons. Your password must contain at least six characters and we suggest that you use a mix of letters and numbers for maximum security.

UNIVERSITY OF CAMBRIDGE

Change Password

* Current Password

* New Password

* Re-enter New Password

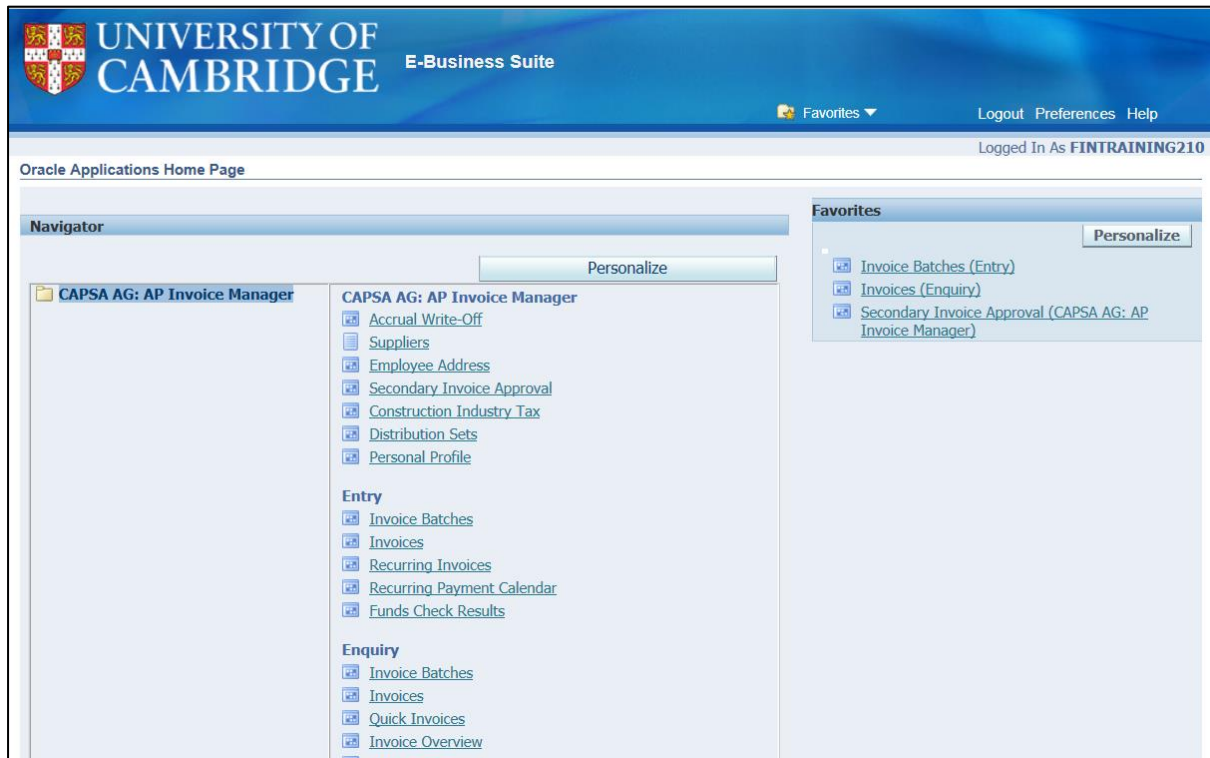
Password must be at least 6 characters long.

* Indicates required field

[Privacy Statement](#) [Logout](#)

After changing your password you will be directed to the E-Business Suite homepage.

Once you have logged in the E-Business Suite Homepage will appear.



The homepage is split into three main sections:

- **Responsibilities**
- **Tasks**
- **Favorites** (note American spelling).

A **responsibility** is having the ability to use a specific area of the system and within each responsibility there are various tasks that can be performed. Your responsibilities on the Live system are designated by your key contact and further information can be found on the UFS homepage. Responsibilities on the Play system are added by Finance Training.

The example in the above image shows the responsibility **CAPSA AG: AP Invoice Manager**. When broken down it means:

CAPSA -the name given to the project that set up UFS back in 2000.
AG - every department in the University has a unique two-letter code. AG represents the Finance Division. You will see your own code in your responsibilities on the Live system.
AP -represents the **Accounts Payable** module, where supplier invoices are processed.
Invoice Manager-indicates the level of access within the module.

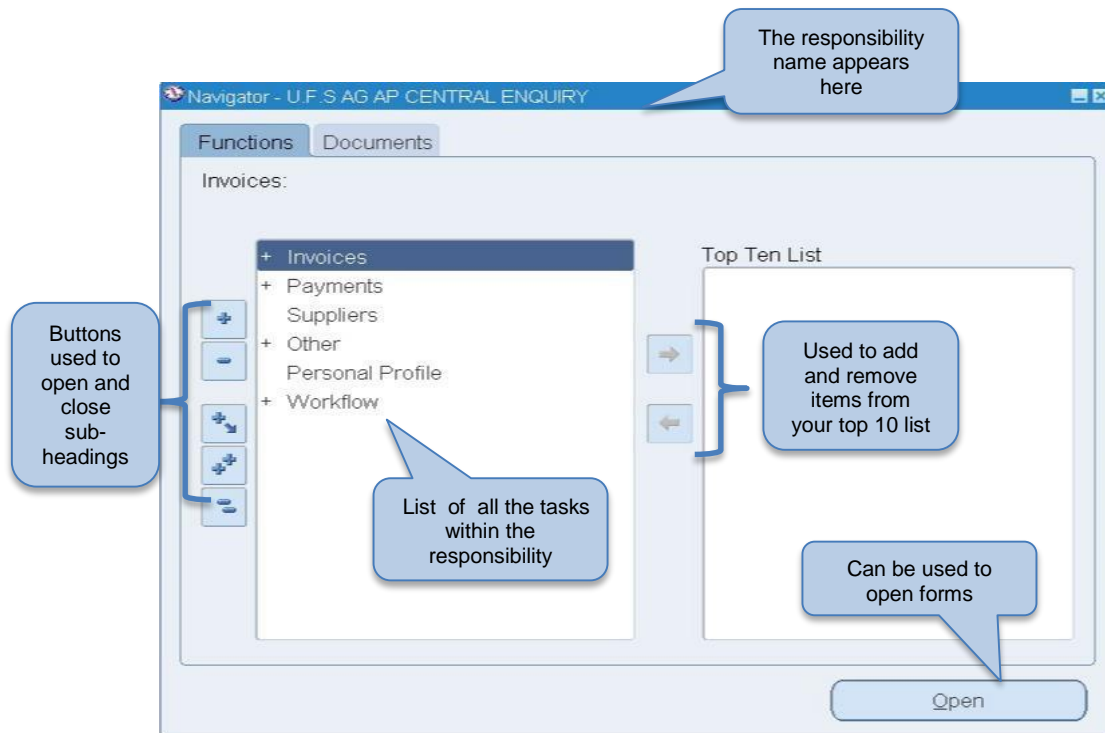
Tasks within a responsibility will appear on the middle of the page when the responsibility name is selected.

Favorites allow you to create a list of most commonly used tasks so that you can access them straight from the list. This will save time as you will not have to select the responsibility first and scroll down until you find the task that you need. For instructions on how to set these up please refer to the [Additional UFS information](#) document



The Navigator

When you select a responsibility from the E-Business Suite Homepage and click on the relevant task, UFS will load and the relevant form will display. When that form is closed, the Navigator is displayed, as shown below:



The navigator displays all of the tasks within the selected responsibility.

Tasks with a + symbol adjacent to them are actually sub-headings. Each sub-heading contains one or more tasks within it and you will need to perform **any one of the following** to open them:














- Double-click the heading.
- Click on the heading and click the Open button.
- Click on the blue + icon.
- Click on the heading and press the Enter key on your keyboard.

Opening a task follows the same principles as opening a sub-heading; however the most straightforward way is to double-click on the task name.




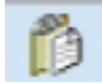




The Oracle Toolbar



Navigate to		Returns to the Navigator screen
Zoom		Invokes defined zoom and goes to that form within the system (Unable to use)
Save		Saves any pending changes
Print		Prints current screen or print a report (Do not use)
Close form		Closes the form (screen) you have open.
Find		Choosing once invokes the query mode; choosing again runs a query.
New Record		Creates a new record or line
Delete Record		Deletes the current record from the database.
Clear Record		Clears all data pertaining to current record in window.
Folder Tools		Displays the Folder tool palette. (Separate guide on folder tools)
Attachments		Opens the Attachments window.
Edit		Opens the Editor window for the current field.
Window Help		Displays general help for the current application.





Responsibilities		Displays other responsibilities (only available within the Navigator Window).
Cut		Cuts the description of the field you are currently clicked in
Copy		Copies the description of the field you are currently clicked in
Paste		Pastes the description you have just cut or copied
Next Step		Updates workflow in the Navigator by advancing to the next step in the process (<i>Unable to use</i>)
Transitions		Opens the Translations window (<i>Unable to use</i>)



Completing a UFS form

Regardless of which task you need to perform in UFS, there are several common principles that feature throughout. This section will illustrate those principles.

- Information will automatically default in to some fields as soon as the form is opened.
- If you click into a field and it turns yellow, it is a mandatory field and therefore must be completed before you can move on.
- Some forms will have several tabs containing different fields. The tab that is currently selected will be coloured blue.
- If you click into a field and the  icon appears, this signifies that there is a list of values to choose from, which can be accessed by clicking on the three dots or by pressing **Ctrl+L** on your keyboard.
- If you click into a field and the  icon does not appear, this signifies that it is a free text field; meaning that you can type freely to include any appropriate information.
- The **%** symbol acts as a wildcard in UFS when searching for information.

E.g. if you needed to raise a purchase order to Office Depot to order some stationery, in the supplier field you could enter Office% to find all of the University's suppliers beginning with Office.

- Important messages will appear at the bottom left hand side of the screen, such as confirming that your work has been saved when you click the save icon on the toolbar, or letting you know if you are trying to proceed without completing a mandatory field.

If you prefer to use the keyboard instead of the mouse, some of these keyboard shortcuts will benefit you when navigating around a form.

- | | |
|---------------------------|----------|
| • List of Values | Ctrl L |
| • Save | Ctrl S |
| • Edit | Ctrl E |
| • Exit | F4 |
| • Clear Field | F5 |
| • Clear Record | F6 |
| • Clear Form | F8 |
| • Duplicate Field | Shift F5 |
| • Duplicate Record | Shift F6 |
| • Query Enter | F11 |
| • Query Run | Ctrl F11 |



UFS Jargon Buster

<i>UFS Jargon</i>	<i>Translates to</i>
AP	Accounts Payable module. Paying supplier invoices.
AR	Accounts Receivable module. Raising sales invoices and accounting for income.
Award	Represents the source of funding
CAPSA	Name given to set up Oracle in 2000.
Category	Code given to classify goods and services purchased.
Chart of Accounts	University account code structure.
Cost Centre	Reflects each activity within the department.
CRSid	User identity; usually comprised of your initials followed by two to four digits.
(C)UFS	(Cambridge) University Finance System.
Distributions	Process of charging expenditure or allocating income.
Expenditure Type	The category heading used to classify expenditure when coding to a project.
Favourites	Set up on the E-Business Suite Homepage to create shortcuts through to frequently used tasks.
Folder Tools	Allows you to customise the look of some forms.
General Ledger (GL)	Heart of the accounting system that collates information on all processed transactions.
iProc	The iProcurement module for all your purchasing needs
Navigator	Screen that displays all of the tasks available within the selected responsibility.



<i>UFS Jargon</i>	<i>Translates to</i>
Personal Profile	Used to store specific defaults such as your printer and telephone and fax numbers.
Preferences	Used to change your UFS login password as well as amend your Personal Profile
Project Code	Usually the same as the warrant number
Responsibility	Ability to use a specific area of the system.
Source of Funds	Used to distinguish where funds have originated from.
Task	Splits a project in to manageable “work parcels”. EM uses the building code.
Transaction Code	Describes the type of item that is being purchased or sold.
Top Ten List	List of frequently used tasks that displays on your Navigator screen. It is specific to each responsibility.
UFS	University Finance System.
UOM	Unit of Measure.
Wild card	The % symbol, used to assist when searching for information.



UFS Helpdesk Information

Accounts Payable

Telephone: (7)66888

Email: UFS_AP@admin.cam.ac.uk

Accounts Receivable

Telephone: (3)32215

Email: UFS_AR@admin.cam.ac.uk

General Ledger Journals

Telephone: (3)39660

Email: UFS_GLJ@admin.cam.ac.uk

General Ledger Reporting

Telephone: (7)65098

Email: UFS_GLR@admin.cam.ac.uk

Purchasing

Telephone: (7)65101

Email: UFS_PO@admin.cam.ac.uk

Inventory

Telephone: (7)66780

Email: UFS_INV@admin.cam.ac.uk

Research Grants

<http://www.research-operations.admin.cam.ac.uk>

Fixed Assets

Telephone: (7)66780

Email: UFS_FA@admin.cam.ac.uk

General Queries and Password resets

Telephone: (7)65999

Email: UFS_Enquiries@admin.cam.ac.uk

New User Access

Telephone: (7)65999

Email: UFS_Users@admin.cam.ac.uk